

WordPress I

Lesson Plan

A student with no prior knowledge of blogging or web development learns how to create a blog site using the WordPress platform.

Lesson Objectives

The student will understand and can accomplish these tasks at the end of the lesson:

* How to sign up for a WordPress.com account and login to the WP Admin Dashboard.
* How to create posts and pages and insert images, polls, and forms.
* How to manage comments, with the goal of limiting spam.
* The difference between tags and categories and how to use them.

Lesson Prep Work

(30 min, at a minimum, prior to student arrival)

* get in early to test for technology failure, because it will happen :-)
* pre-sign into accounts
  + username:
  + password:
* pre-load any videos or web demos (e.g. .com vs. .org sites)
* pre-save example documents (photos, etc.)
* delete any posts, pages, menus, widgets, and/or categories from previous class
* print handouts

Lesson Prerequisites

* Email address
* Comfort navigating the web
* WordPress.com account creation or WordPress.org installation prior to class is *highly* recommended.

Lesson Outline

The lesson is completed in one [120-minute] class session.

* (20 min) Introduction
  + Intro Activity: As students enter, have them login to and/or set up their WordPress account.
    - For those with WordPress.org already installed, have them login to their site (theirdomain.com/wp-admin).
    - For those without an account, direct them to WordPress.com to create one.
      * Follow instructions.
      * Check email for verification.
      * Discuss creating their WordPress URL.
        + Point out that free domain includes “wordpress” in the URL.
        + For businesses, recommend that they consider buying a domain without “wordpress” in the URL.
  + Intro:
    - Introduce instructor, students.
    - Let students know it’s okay to take phone calls, but ask them to put their phone on vibrate and answer calls outside the classroom.
    - Inform students that they can sit back and watch if the class is too advanced.
    - Inform students they can go to the bathroom, they don’t need permission.
    - State/show order in which class will happen. Explain scope of class.
  + Intro Question(s): Has anyone used WordPress before? What do you plan to use it for?
  + What is WordPress?
    - *Optional:* Watch video on WordPress.com homepage.
    - It’s an open source blogging platform with the largest user base of any self-hosted blogging tool.
    - It’s highly extensible with lots of add-ons and plug-ins.
    - It’s free.
  + What is the difference between WordPress.com and WordPress.org?
    - [http://en.support.WordPress.com/com-vs-org/](http://en.support.wordpress.com/com-vs-org/)
    - Show WordPress.org examples: [http://WordPress.org/showcase/](http://wordpress.org/showcase/)
    - Show WordPress.com examples.
    - Emphasize that we will be using WordPress.com throughout the course, though many of the features and functions are the same or quite similar to WordPress.org.
  + Why WordPress?
    - Large community = lots of support
    - Dynamic content = potential for large readership
  + WordPress as a blog *and* website
    - WordPress is flexible enough to meet many needs
      * It can be reconfigured to be a content management system (CMS), etc. but you may need to invest in upgrades to make extensive customizations and/or a robust website.
* (90 min) Activities
  + WP Admin Dashboard
    - Dashboard:
      * This is the first page when logged in.
      * There are currently two dashboard iterations:
        1. “New”: simplified blue/white colored interface (what’s first displayed when users log in).
        2. “WP Admin”: traditional dashboard

We’ll be focusing on the “WordPress Admin” dashboard because:

It offers more features than the “new” dashboard.

It closely resembles the WordPress.org dashboard.

*Tip:* Some features in the “traditional” dashboard need to be turned on at first log in.

*Demo then do:* show how to log directly into WordPress Admin.

theirdomain.WordPress.com/wp-admin

*Demo then do:* show how to access WordPress Admin from “new” .com dashboard.

My Sites -> WordPress Admin

* + - * Dashboard can be customized/rearranged.
    - *Define:* Backend (vs.) Frontend
    - Toolbar
      * View blog/website
      * Give quick explanation of key elements of Side Toolbar
  + General settings overview
    - General settings
      * Tagline
      * Location, time, etc.
    - General Privacy settings
      * Settings -> Reading
    - Personal/Profile Settings
      * Users -> Personal Settings
      * Users -> My Profile
  + Themes
    - Show how to choose/change theme: Appearance -> Themes
    - Search filters
    - Free vs. Premium
    - Customization: Appearance -> Customization
      * Tip: Customization varies from theme to theme.
      * Custom Design upgrade = $30/blog
      * .org customization
        + Many .org themes are free to customize
        + *Demo:*  Appearance -> Customization -> Edit CSS

Can customize via CSS stylesheet

Some themes need a plugin in access Edit CSS

*Tip:* quick explain the difference between Editor and Edit CSS.

Editor is the theme’s .php and stylesheets.

*Tip:* avoid editing this, as it can break your site and, also, your changes will be lost with each theme update.

Edit CSS is a stylesheet that is loaded after your theme, so that you can use it to customize your site without needing to know .php or risking breaking your site and losing your changes after each theme update.

Plug our HTML & CSS classes

* + Adding Pages and Posts
    - *Definition:* explain the difference between a Post and a Page.
    - *Demo then do:* add at least one post and an About page.
      * WYSIWYG overview
        + *Tip:* click on the Kitchen Sink for additional formatting options.
      * Basic formatting
      * Text Tab: editing HTML
      * Show how to add:
        + Links
        + Images

Upload vs. Insert URL

* + - * + Videos

Only via Insert URL

* + - * + Polls
      * Insert Read More Tag button: how to create a Fold in a post
      * Paste as Text and Remove Formatting buttons
      * Show how to edit a Post/Page.
        + Quick Edit vs. Edit
  + Managing Comments
    - Settings -> Discussion
      * Restrictions can be overridden for individual posts, making it possible to maintain both a blog & have static webpages
        + Can turn off comments completely, making it more like website than a blog.

Uncheck: “Allow people to post comments on new articles”

* + - * + Can set different requirements for commentors:

whether or not name and email is required

whether or not they have to register with WordPress.com

* + - * + Close comments: will close comments automatically on articles.
        + Threads (comments on comments): can limit how deeply comments nest
        + Number of comments per page:

number displayed when page is first loaded

order: chronological or reverse chronological

* + - * Email settings
        + How often do you want to get notified?
      * Approval of comments
        + Can hold all for approval.

*Tip:* This can be tedious, if you’re suddenly running a popular website.

* + - * + Can automatically approve people who have previously had approved comments

*Tip:* You’ll still want to review comment threads.

* + - * Point out Activity overview on Dashboard page.
      * Point out Comments in Dashboard side toolbar.
        + Allows for bulk editing for comments.
  + Managing spam
    - The point of all the Discussion settings is to handle spam.
      * *Define:* Spam are comments that have nothing to do with your website.
      * Discussion settings:
        + Can have spam held indefinitely instead of automatically deleted from old posts

Check: “Safe: always put spam in the Spam folder for review.” in Settings -> Discussion.

* + - * + Can hold comments in queue

*Tip:* 2 or more links are usually a good sign something is spam (this is the default setting).

* + - Akismet! Included automatically in both .com installations, Akismet is a spam manager.
      * .org users need to install the Akisment or Jetpack plugin in to access this feature.
        + *Optional*: brief discussion on Plugins (.org) and Jetpack (a .org Plugin that contains the most used default features on .com sites).
      * Can see stats at Dashboard -> Akismet (.com) Jetpack -> Akismet (.org) stats
      * *Demo:* give quick overview of reading Akismet stats/graph
  + Tag vs Categories
    - Why tag/categorize?
      * To match intention with content
      * To make topics/themes easily recognizable
      * To define the focus of your posts
    - What’s the difference between Categories and Tags?
      * Categories
        + These are the overarching subjects/themes of your blog
        + Category tips:

Categories are a kind of table of contents for your blog.

Each category should eventually have a minimum of 5 blog posts.

Avoid synonyms.

Categories can be hierarchical.

Categories are indexed by search engines (tags are not).

* + - * Tags
        + Index words
        + Links
        + Frequently used tags may grow up to be categories
        + Include synonyms and miss spellings
      * *Activity:* Categories vs. Tags
        + Brainstorm all topics of interest
        + Narrow down to most crucial 5-7 (no more than 10)

These are Categories.

* + - * + Remaining topics should be considered as Tags, and new Tags may arise with each new post.
    - Demo then do: create Categories and Tags.
      * Posts -> Categories/Tags
      * Show how to add Categories and Tags to Posts:
        + Via WYSIWIG
        + Via Quick Edit
  + Support
    - [http://en.support.WordPress.com/](http://en.support.wordpress.com/)
    - https://WordPress.org/support/
    - [http://learn.WordPress.com/](http://learn.wordpress.com/)
    - Monthly WordPress Happiness Hours in ideaLAB (2nd Tuesday of the Month)
      * *Demo:* MeetUp.com WordPress Happiness Hour website
    - YouTube tutorials, etc.
  + Assign homework
    - Sketch an outline of your website (“wireframe” sketch).
    - Clearly define the purpose of your site.
    - Add at least one page to your site.
    - Add at least one post to your site.
* (10 min) Conclusion
  + Go over handout, review material, emphasize contact info & further resources on handout.
  + Any questions? Final comments?
  + Remind patrons to practice; assign take-home-practice - remind them they can ask for help
  + Remind to take survey.

What This Lesson Does Not Cover

* Making a website with WordPress. This will be covered in Part II.
* Installation of Wordpress.org.